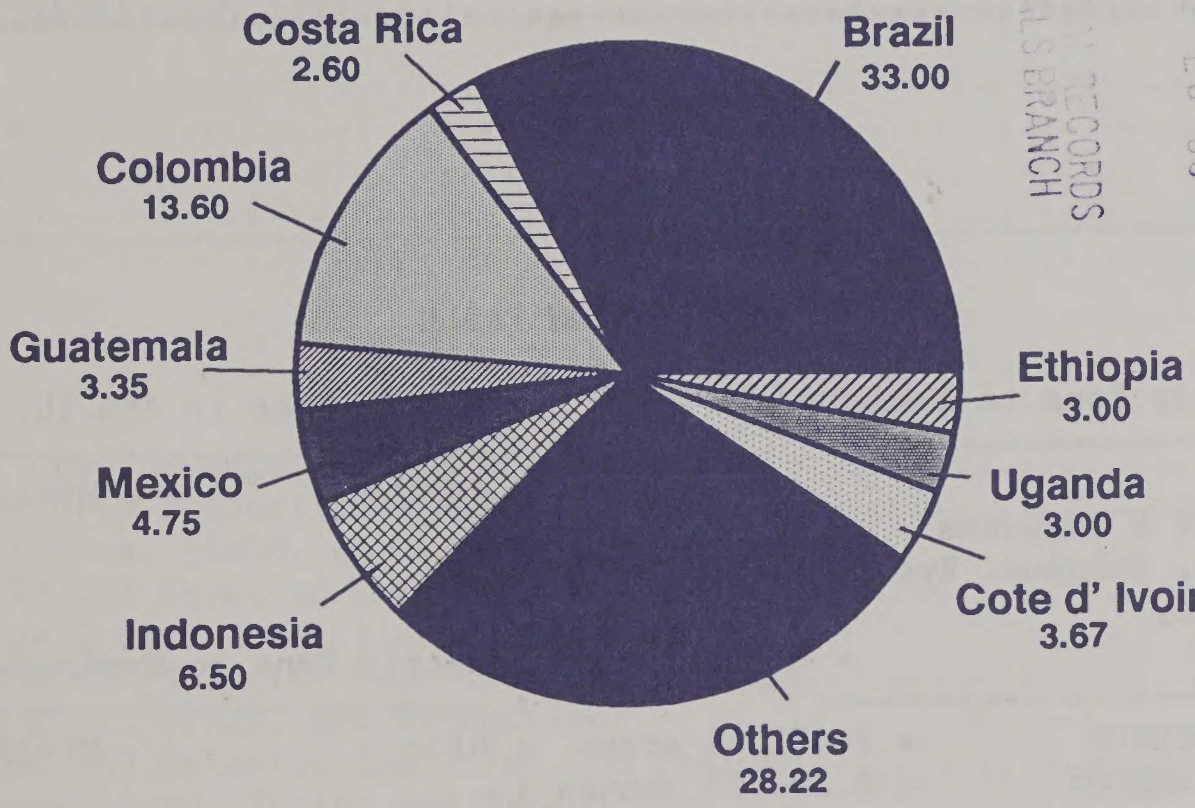
United States
Department of
Agriculture

Foreign
Agricultural
Service

Circular Series
WAP 6-90
June 1990

World Agricultural Production

World Coffee Production 1990/91 Forecast



Million (60 Kilogram) Bags

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- World Citrus Production
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Approved by the World Agricultural Outlook Board - USDA

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. All numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-243), June 12, 1990.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888.

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* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on July 13, 1990. *
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CONVERSION TABLE

Metric Tons to Bushels		Metric Tons to 480-lb. Bales	
		Cotton	= MT*4.592917
Wheat & Soybeans	= MT*36.7437		
Corn, Sorghum, Rye	= MT*39.36825		
Barley	= MT*45.929625		
Oats	= MT*68.894438	**Metric Tons to Hundredweight**	
1 hectare	= 2.471044 acres	Rice	=MT*22.04622
1 kilogram	= 2.204622 pounds		

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PRODUCTION HIGHLIGHTS FOR 1990/91

WHEAT: World production for 1990/91 is projected at a record 568.2 million metric tons, virtually unchanged from last month's figure, but up 6 percent from a year ago. Significant changes from last month include the following:

- o **United States** — Production is projected at 73.2 million tons, virtually unchanged from last month, but up 17.8 million or 32 percent from 1989/90.

- o **Chile** — Production is projected at 1.6 million tons, down 0.2 million or 10 percent from last month, and 16 percent below the 1989/90 crop. Area is expected to be 14 percent lower than last year as profitable alternative crops are sought.

- o **EC-12** — Production is projected at 80.8 million tons, up 0.3 million or less than 1 percent from last month, and 3 percent above 1989/90. The mild winter has improved yield prospects in Spain, while Portugal reports larger harvest area prospects.

- o **Eastern Europe** — Production is projected at 43.0 million tons, down 0.2 million or less than 1 percent from last month, but 2 percent above the previous year. The decrease reflects reduced area in Hungary and less favorable yield prospects in Bulgaria.

- o **Pakistan** — Production is estimated at a record 14.6 million tons, down 0.4 million or 3 percent from last month, but up 1 percent from last year's crop. Although wheat area is expected to be higher based on provincial harvest statistics, yields are projected to decline due to lower input usage and adverse weather conditions during the planting season.

- o **Turkey** — Production is forecast at 13.5 million tons, up 0.5 million or 4 percent from last month's estimate, and up 17 percent from a year ago. The new estimate is based on favorable rains in recent weeks which are expected to boost yields.

COARSE GRAINS: World production for 1990/91 is projected at 820.5 million tons, up 0.6 million or less than 1 percent from last month, and up 3 percent from a year ago. Significant changes from last month include the following:

- o **China** — Production is projected at 96.4 million tons, up 1.0 million or 1 percent from last month, and slightly up from last year's revised estimate. The corn production forecast was raised 1.0 million tons to 80.0 million tons. Higher yields are anticipated due to excellent planting conditions this spring.

- o **EC-12** — Production is projected at 79.6 million tons, down 0.2 million or less than 1 percent below last month, and nearly 3 percent below last year's estimate. Despite improved winter barley prospects in Spain, dry spring planting for corn is expected to reduce total coarse grain production by more than 0.2 million tons. Similarly, coarse grain prospects in Portugal have been dampened by a reduction in the volume of oat plantings.

- o **Peru** — Production is estimated at 0.8 million tons, down 0.2 million or 20 percent from last month, and 21 percent below a year ago. Reductions are expected in corn area and yields due to the continuing drought which severely affected mountain-grown white corn.

RICE (MILLED-BASIS): World production for 1990/91 is projected at 340.1 million tons unchanged from last month, but down 0.9 million or less than 1 percent from the 1989/90 crop. Foreign production in 1990/91 is projected at 335.0 million tons, a decline of 1.0 million or less than 1 percent from 1989/90. U.S. output is projected at 5.1 million tons, up 0.2 million or 4 percent from last season.

OILSEEDS: Total world oilseeds production for 1990/91 is forecast at a record 222.0 million tons, up 9.4 million or 4 percent from the 1989/90 crop. Foreign production during 1990/91 is projected to be a record 161.0 million tons, up 7.8 million or 5 percent from last year. U.S. production is projected at 61.0 million tons, up 1.7 million or 3 percent from 1989/90.

COTTON: World production for the 1990/91 season is forecast at 88.0 million bales. This estimate is unchanged from last month, but 11 percent greater than the estimated 1989/90 volume of 79.0 million, and second only to the record 89.0 million bale crop harvested in 1984/85. The U.S. production estimate remains unchanged at 16.0 million bales, 31 percent above last year and potentially the largest crop since the 1953/54 season. Total foreign production is projected at 72.0 million bales, also unchanged from last month, but 8 percent more than the 1989/90 estimate and possibly just short of the record 1984/85 crop.

PRODUCTION HIGHLIGHTS FOR 1989/90

WHEAT: World production for 1989/90 is estimated at 534.8 million tons, down 0.4 million or less than 1 percent from last month. The lower figure primarily reflects minor downward revisions in the estimates for China and Eastern Europe.

COARSE GRAINS: World production for 1989/90 is estimated at 799.7 million tons, up 1.2 million or less than 1 percent from last month. The revision reflects a significantly higher corn estimate for China, which more than offset downward revisions for Argentina and Brazil.

RICE (MILLED-BASIS): World production for 1989/90 is estimated at a record 341.0 million tons, up 0.1 million or less than 1 percent from last month. Significant changes from last month include the following:

- **Brazil** — Production is estimated at 5.7 million tons, down 0.5 million or 9 percent from last month, and 24 percent below last year. The decrease is due to reductions in area and yields in the center-south crop.

- **China** — Production is estimated at a record 126.1 million tons, up 0.8 million or 1 percent from last month, and 6 percent above the 1988/89 harvest. Rice production benefited from excellent weather in key growing areas, a sizable increase in planted area, and expanded use of agricultural inputs and hybrid seeds.

- **Philippines** — Production is estimated at 5.9 million tons, down 0.1 million or 2 percent from last month, and 2 percent below a year ago. Despite an increase in total planted area, drought in the major growing regions has reduced yields and production.

OILSEEDS: The June estimate of total world oilseeds production for 1989/90 is pegged at a record 211.0 million tons. This month's forecast is down 1.6 million tons from last month, but up 8.0 million or 4 percent from last year's output. U.S. production is estimated at 59.3 million tons, unchanged from last month, but up 9 million or 18 percent from a year ago.

* **Soybeans:** World production for 1989/90 is forecast at a record 106.0 million tons, down 0.7 million from last month, but 10.7 million or 11 percent above a year ago. Significant changes from last month include the following:

- **Argentina** — Production is estimated at 10.8 million tons, up 0.3 million or 3 percent from last month, and 69 percent greater than last year's drought-damaged crop. The increase is based on generally higher-than-expected yields in the important growing regions as well as higher yields for second-crop soybeans.

o **Brazil** Production is estimated at 19.3 million tons, down 0.2 million or 1 percent from last month, and 17 percent below a year ago. The decrease is due to below average yields that resulted from unfavorable weather and lower than normal input use.

o **EC-12** Production is estimated at 2.0 million tons, 0.2 million or 12 percent above last month's figure. The increase is due to expanded soybean area in Italy, reflecting favorable prices for soybeans relative to corn.

o **Paraguay** Production is estimated at 1.4 million tons, down 0.5 million or 25 percent from last month, and 16 percent below the 1988/89 level. The decline is due entirely to poor yields, a result of hot, dry weather at flowering.

o **China** Production is estimated at 10.2 million tons, down 0.6 million or 5 percent from last month and 12 percent below a year ago. The reduction is based on an official estimate from the State Statistical Bureau. Poor weather in the major soybean growing provinces of Heilongjiang and Shandong caused a significant reduction in yields.

* **Cottonseed:** World production for 1989/90 is estimated at 30.4 million tons, down 0.6 million from last month, and 2.0 million or 6 percent below 1988/89. Significant changes from last month include the following:

o **China** Production is estimated at 6.4 million tons, down 0.3 million or 4 percent from last month, and 9 percent below a year ago. The cotton production estimate was reduced due to a decline in planted area, low producer prices, and poor growing conditions.

o **USSR** Production is estimated at 4.7 million tons, down 0.2 million or 3 percent from last month, and 6 percent below 1988/89. Revised official government estimates reduced cottonseed production.

* **Peanuts**: World production for 1989/90 is estimated at 21.8 million tons. June's production estimate is down 0.3 million tons from last month, and 1.6 million or 7 percent less than a year ago. Significant changes from last month include the following:

  - **India** — Production is estimated at 7.7 million tons, down 0.3 million or 4 percent from last month, and 14 percent below last year's record crop. Peanut area was adjusted upward, matching last year's level, while yields were lowered owing to poor rainfall distribution during the summer monsoon in Gujarat.

* **Sunflowerseed**: World production for 1989/90 is estimated at a record 21.4 million tons, down 0.1 million from last month, but up 1.0 million or 5 percent from a year ago.

* **Rapeseed**: World production for 1989/90, estimated at 21.7 million tons, is the third largest on record, but represents a decline in production for the second consecutive year. The June estimate is up slightly from last month, but down 0.8 million or 4 percent below the 1988/89 volume.

* **Flaxseed**: World production for 1989/90 is estimated at 1.9 million tons, down slightly from last month, but up 0.3 million or 16 percent from a year ago. The record crop of 3.0 million tons has not been seriously challenged since 1977/78, as world production has been trending downward.

* **Copra**: World production for 1989/90 is estimated at 4.6 million tons, up slightly from last month, and 0.3 million or 7 percent greater than a year ago. For many years, copra production has ranged between 4.3-4.8 million tons, the record being 5.3 million tons in 1985/86.

* **Palm Kernels**: World production for 1989/90 is estimated at a record 3.2 million tons, unchanged from last month, and up 0.3 million or 10 percent from last year.

* **Palm Oil**: World production for 1989/90 is estimated at a record 10.4 million tons, unchanged from last month, and 1.0 million or 10 percent greater than a year ago.

COTTON: World cotton production in 1989/90 is estimated at 79.0 million bales, down 0.8 million bales from last month, and 5.5 million bales or 7 percent below a year ago. Foreign production is estimated at 66.8 million bales, down nearly 0.8 million bales from last month, and 3 percent below the 1988/89 estimate. U.S. production is estimated at 12.2 million bales, unchanged from last month.

  - **China**: — Production is estimated at 17.4 million bales, down 600,000 bales or 3 percent from last month, and 9 percent below the 1988/89 crop. An unfavorable price relationship between cotton and competing crops shifted land and inputs away from cotton, causing production to hit the lowest level since 1986.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. May	1990/91 Proj. Jun.	1988/89	Prel. 1989/90	1990/91 Proj. May	1990/91 Proj. Jun.
	--Million Acres--			--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	65.5	76.6		53.2	62.1		34.1	32.8			1,812	2,036	2,692	2,689
Winter	48.8	55.1	57.2	39.8	41.5	50.7	39.2	35.0	41.3	41.2	1,562	1,454	2,092	2,089
Other	16.7	21.5		13.4	20.7		18.7	28.1			250	582	600	600
Rye	2.4	2.0		0.6	0.5		24.7	29.1			15	14	15	15
Soybeans	58.8	60.7		57.4	59.4		27.0	32.4			1,549	1,927	1,925	1,925
Corn	67.7	72.3		58.3	64.8		84.6	116.2			4,929	7,527	8,100	8,100
Sorghum	10.3	12.6		9.0	11.2		63.8	55.2			577	618	685	685
Barley	9.8	9.2		7.6	8.3		38.0	48.6			290	403	415	415
Oats	13.9	12.1		5.5	6.9		39.3	54.2			218	374	350	350
							--Pounds per Acre--				---Million CWT.---			
Rice	2.9	2.7		2.9	2.7		5,514	5,722			159.9	154.5	160.0	160.0
											---Million 480-Pound---			
All Cotton	12.5	10.6		12.0	9.5		619	614			15.4	12.2	16.0	16.0

1/ Estimates from USDA Agricultural Statistics Board for 1988/89, 1989/90 and winter wheat estimates for 1990/91.
All other 1990/91 estimates are from USDA Interagency Commodity Estimates Committee.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa	Turkey	
									——Million Metric Tons——											
Wheat																				
1988/89	500.8	451.5	49.3	16.0	3.2	74.7	3.9	44.8	84.4	85.4	46.2	0.0	12.7	0.0	8.4	5.8	14.1	3.5	15.0	17.8
1989/90 prel.	534.8	479.4	55.4	24.4	4.0	78.6	4.4	42.2	90.5	90.8	54.0	0.0	14.4	0.0	10.2	5.6	14.7	2.2	11.5	15.7
1990/91 proj.																				
May	568.2	494.9	73.3	26.5	3.6	80.5	4.5	43.2	95.0	93.0	54.0	0.0	15.0	0.0	11.5	5.1	14.5	2.4	13.0	16.9
June	568.2	495.0	73.2	26.5	3.6	80.8	4.5	43.0	95.0	93.0	54.0	0.0	14.6	0.0	11.5	5.1	14.5	2.4	13.5	16.7
Coarse Grains																				
1988/89	728.6	578.9	149.7	19.7	13.8	88.1	11.4	59.5	97.5	94.2	31.7	5.2	2.4	4.4	7.3	26.7	6.7	13.0	10.0	87.3
1989/90 prel.	799.7	578.3	221.4	23.5	14.1	81.7	12.3	66.7	107.0	94.6	31.2	4.8	2.8	4.2	8.3	23.4	6.9	9.3	7.4	80.1
1990/91 proj.																				
May	819.9	582.3	237.7	23.8	15.0	79.8	11.8	67.3	106.5	95.4	31.8	5.0	2.7	4.3	9.5	24.9	6.5	9.3	8.0	80.6
June	820.5	582.9	237.7	23.8	15.0	79.6	11.8	67.4	106.5	96.4	31.8	5.0	2.7	4.3	9.5	24.9	6.5	9.3	8.0	80.4
Rice (Milled)																				
1988/89	330.2	325.0	5.2	0.0	0.3	1.3	0.0	0.2	1.9	118.4	70.7	27.5	3.2	13.9	0.3	7.5	0.6	0.0	0.2	22.9
1989/90	341.0	336.0	4.9	0.0	0.4	1.3	0.0	0.2	1.8	126.1	70.0	29.1	3.2	13.9	0.3	5.7	0.6	0.0	0.2	23.5
1990/91																				
May	340.1	335.0	5.1																	
June	340.1	335.0	5.1																	
Total Grains 1/																				
1988/89	1,559.5	1,355.3	204.2	35.7	17.2	164.1	15.2	104.5	183.8	298.0	148.6	32.7	18.3	18.4	16.0	40.0	21.3	16.6	25.2	199.8
1989/90	1,675.5	1,393.7	281.8	47.8	18.5	161.6	16.6	109.1	199.3	311.5	155.2	33.9	20.4	18.1	18.8	34.7	22.2	11.5	19.1	195.5
1990/91																				
April	1,728.2	1,412.2	316.0																	
May	1,728.8	1,412.9	315.9																	
Oilseeds 2/																				
1988/89	202.9	152.6	50.3	5.9	1.0	11.5	0.6	5.1	12.7	30.6	19.0	2.0	3.2	0.7	10.6	24.6	1.7	0.9	2.3	20.3
1989/90 prel.	211.0	151.6	59.3	4.9	1.4	10.9	0.7	5.9	13.3	28.5	18.3	1.9	3.3	0.8	15.9	20.7	0.7	0.9	2.3	21.2
1990/91 proj.																				
May	222.0	161.0	61.0																	
June	222.0	161.0	61.0																	
									——Million 480-Pound Bales——											
Cotton																				
1988/89	84.5	69.1	15.4	0.0	1.4	1.6	0.0	0.1	12.6	19.1	8.3	0.0	6.6	0.2	0.9	3.4	1.3	0.3	3.0	10.5
1989/90 prel.	79.0	66.8	12.2	0.0	0.8	1.4	0.0	0.1	12.2	17.4	9.8	0.0	6.7	0.1	1.2	3.0	1.3	0.4	2.7	9.8
1990/91 proj.																				
May	88.0	72.0	16.0																	
June	88.0	72.0	16.0																	

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 195.1 million tons in 1988/89, 211.1 million in 1989/90, and 215.0 million forecast in 1990/91.
2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.
Note: Entries of 0.0 indicate no reported or insignificant production.

June 1990

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. May	June	1988/89	Prel. 1989/90	1990/91 Proj. May	June
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	218.0	225.7		2.30	2.37			500.8	534.8	568.2	568.2
United States	21.5	25.2		2.29	2.20			49.3	55.4	73.3	73.2
Total Foreign	196.5	200.6	203.3	2.30	2.39	2.44	2.43	451.5	479.4	494.9	495.0
Maj. Foreign Exporters	42.1	44.3	45.6	2.69	2.89	2.92	2.92	113.1	127.8	133.0	133.3
Argentina	4.7	5.5	6.0	1.79	1.86	1.92	1.92	8.4	10.2	11.5	11.5
Australia	8.9	8.9	9.8	1.58	1.64	1.48	1.48	14.1	14.7	14.5	14.5
Canada	13.0	13.6	14.1	1.23	1.79	1.88	1.88	16.0	24.4	26.5	26.5
EC-12	15.5	16.3	15.7	4.81	4.83	5.14	5.15	74.7	78.6	80.5	80.8
Major Importers	95.9	97.1	97.9	2.39	2.46	2.51	2.51	229.3	238.6	245.7	245.5
Brazil	3.5	3.4	3.2	1.68	1.65	1.59	1.59	5.8	5.6	5.1	5.1
China	28.8	29.8	30.2	2.97	3.04	3.08	3.08	85.4	90.8	93.0	93.0
Eastern Europe	10.7	10.7	10.7	4.17	3.95	4.03	4.01	44.8	42.2	43.2	43.0
Egypt	0.6	0.6	0.7	4.76	5.05	5.38	5.38	2.8	3.2	3.5	3.5
Other N. Africa 1/	4.0	4.7	4.8	1.26	1.13	1.02	1.02	5.0	5.3	4.9	4.9
Japan	0.3	0.3	0.3	3.62	3.47	3.52	3.52	1.0	1.0	1.0	1.0
USSR	48.1	47.5	48.0	1.76	1.91	1.98	1.98	84.4	90.5	95.0	95.0
Other Foreign	58.5	59.3	59.8	1.86	1.91	1.94	1.94	109.1	113.0	116.2	116.1
India	23.1	24.1	23.7	2.00	2.24	2.28	2.28	46.2	54.0	54.0	54.0
Iran	6.3	6.3	6.3	1.08	1.08	1.08	1.08	6.8	6.8	6.8	6.8
Mexico	0.8	1.0	0.9	4.00	4.21	4.11	4.11	3.2	4.0	3.6	3.6
Non-EC W. Europe	0.8	0.8	0.9	5.01	5.17	5.02	5.02	3.9	4.4	4.5	4.5
Pakistan	7.3	7.7	7.8	1.73	1.87	1.92	1.87	12.7	14.4	15.0	14.6
South Africa	2.0	1.8	1.9	1.78	1.19	1.30	1.30	3.5	2.2	2.4	2.4
Turkey	8.8	8.7	8.8	1.71	1.32	1.49	1.54	15.0	11.5	13.0	13.5
Others	9.6	8.8	9.6	1.86	1.78	1.76	1.75	17.8	15.7	16.9	16.7

1/ Algeria, Libya, Morocco, and Tunisia.

JUNE 1990 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 4

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA 1988/89	AREA Prel. 1989/90	AREA Proj. 1990/91	YIELD 1988/89	YIELD Prel. 1989/90	YIELD 1990/91 Proj. May	YIELD 1990/91 Proj. June	PRODUCTION 1988/89	PRODUCTION Prel. 1989/90	PRODUCTION 1990/91 Proj. May	PRODUCTION 1990/91 Proj. June
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	325.1	323.0		2.24	2.48			728.6	799.7	819.9	820.5
United States	32.8	37.1		4.56	5.97			149.7	221.4	237.7	237.7
Total Foreign	292.3	285.9	288.4	1.98	2.02	2.02	2.02	578.9	578.3	582.3	582.9
Maj. Foreign Exporters	20.8	21.6	21.7	2.46	2.42	2.46	2.46	51.1	52.2	53.4	53.4
Argentina	2.9	3.1	3.3	2.49	2.65	2.85	2.85	7.3	8.3	9.5	9.5
Australia	4.4	4.0	4.2	1.52	1.72	1.53	1.53	6.7	6.9	6.5	6.5
Canada	7.1	8.5	8.2	2.76	2.77	2.89	2.89	19.7	23.5	23.8	23.8
South Africa	4.6	4.4	4.4	2.86	2.11	2.11	2.11	13.0	9.3	9.3	9.3
Thailand	1.8	1.6	1.5	2.50	2.71	2.89	2.89	4.4	4.2	4.3	4.3
Major Importers	106.5	103.9	103.3	2.55	2.72	2.73	2.73	271.8	283.2	281.8	281.7
Eastern Europe	18.4	18.5	18.5	3.24	3.61	3.65	3.65	59.5	66.7	67.3	67.4
EC-12	19.2	18.5	17.9	4.60	4.41	4.45	4.44	88.1	81.7	79.8	79.6
Other W. Europe	3.2	3.1	3.0	3.54	3.96	3.91	3.91	11.4	12.3	11.8	11.8
Mexico	7.5	7.5	7.9	1.85	1.89	1.90	1.90	13.8	14.1	15.0	15.0
USSR	57.8	55.9	55.5	1.69	1.91	1.92	1.92	97.5	107.0	106.5	106.5
Other Major Import. 2/	0.5	0.4	0.4	3.40	3.34	3.34	3.34	1.5	1.4	1.4	1.4
Other Foreign	165.1	160.4	163.4	1.55	1.51	1.51	1.52	256.0	242.9	247.0	247.8
Brazil	13.4	12.8	13.3	2.00	1.84	1.88	1.88	26.7	23.4	24.9	24.9
China	28.3	28.5	28.7	3.33	3.32	3.33	3.36	94.2	94.6	95.4	96.4
India	39.1	38.6	39.4	0.81	0.81	0.81	0.81	31.7	31.2	31.8	31.8
Indonesia	2.9	2.6	2.8	1.82	1.85	1.79	1.79	5.2	4.8	5.0	5.0
Nigeria	10.1	9.9	10.1	0.84	0.82	0.84	0.84	8.5	8.1	8.5	8.5
Philippines	3.8	3.6	3.7	1.21	1.21	1.18	1.18	4.5	4.4	4.3	4.3
Turkey	4.4	4.4	4.5	2.29	1.68	1.80	1.80	10.0	7.4	8.0	8.0
Others	63.3	60.0	61.0	1.19	1.15	1.13	1.13	75.1	68.9	69.1	68.9
BARLEY											
World	77.4	74.2		2.15	2.27			166.5	168.5	170.3	170.5
United States	3.1	3.4		2.04	2.61			6.3	8.8	9.0	9.0
Total Foreign	74.3	70.8	72.4	2.16	2.26	2.23	2.23	160.2	159.8	161.2	161.5
Australia	2.2	2.3	2.4	1.47	1.75	1.52	1.52	3.3	4.1	3.6	3.6
Canada	4.2	4.9	4.8	2.46	2.39	2.60	2.60	10.2	11.7	12.5	12.5
China	3.7	3.3	3.3	1.67	1.74	1.73	1.73	6.2	5.7	5.7	5.7
Eastern Europe	4.4	4.5	4.4	3.72	4.00	3.85	3.87	16.3	18.1	17.1	17.2
EC-12	12.2	11.7	11.5	4.14	3.93	4.04	4.00	50.3	46.1	45.8	46.0
Other W. Europe	1.7	1.5	1.5	3.30	3.82	3.68	3.68	5.7	5.8	5.6	5.6
Turkey	3.3	3.4	3.4	2.12	1.46	1.62	1.62	7.0	4.9	5.5	5.5
USSR	29.7	27.5	28.5	1.50	1.80	1.81	1.81	44.5	49.5	51.5	51.5
Others	12.9	11.7	12.6	1.29	1.19	1.11	1.10	16.7	13.9	13.9	13.9

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA 1988/89	AREA Prel. 1989/90	AREA Proj. 1990/91	YIELD 1988/89	YIELD Prel. 1989/90	YIELD 1990/91 Proj. May	YIELD 1990/91 Proj. June	PRODUCTION 1988/89	PRODUCTION Prel. 1989/90	PRODUCTION 1990/91 Proj. May	PRODUCTION 1990/91 Proj. June
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	124.9	126.3		3.20	3.65			399.3	460.7	479.6	480.0
United States	23.6	26.2		5.31	7.29			125.2	191.2	205.7	205.7
Total Foreign	101.3	100.1	101.7	2.71	2.69	2.69	2.70	274.1	269.5	273.9	274.3
Maj. Foreign Exporters	7.1	6.7	6.9	3.05	2.64	2.77	2.77	21.6	17.7	19.1	19.1
Argentina	1.7	1.7	2.0	2.94	3.06	3.33	3.33	5.0	5.2	6.5	6.5
South Africa	3.8	3.6	3.6	3.28	2.36	2.36	2.36	12.4	8.5	8.5	8.5
Thailand	1.6	1.4	1.4	2.63	2.86	3.04	3.04	4.2	4.0	4.1	4.1
Major Importers	22.3	21.9	22.1	3.73	3.85	3.86	3.84	83.0	84.2	85.4	85.0
Eastern Europe	7.4	7.4	7.5	3.50	4.01	4.26	4.23	26.0	29.7	31.8	31.8
EC-12	4.1	3.9	3.6	7.00	6.89	6.84	6.83	28.5	26.5	24.7	24.3
Other W. Europe	0.2	0.2	0.2	8.55	7.68	8.35	8.35	1.9	1.7	1.8	1.8
Mexico	6.0	5.8	6.2	1.68	1.68	1.72	1.72	10.1	9.8	10.7	10.7
USSR	4.4	4.5	4.5	3.62	3.56	3.56	3.56	16.0	16.0	16.0	16.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.20	4.17	4.14	4.14	0.4	0.5	0.5	0.5
Other Foreign	72.0	71.5	72.7	2.36	2.34	2.33	2.34	169.5	167.6	169.3	170.1
Brazil	12.9	12.2	12.7	2.02	1.84	1.89	1.89	26.1	22.5	24.0	24.0
Canada	1.0	1.0	1.0	5.47	6.56	6.00	6.00	5.4	6.4	6.0	6.0
China	19.7	20.4	20.5	3.93	3.88	3.85	3.90	77.4	78.9	79.0	80.0
Egypt	0.8	0.8	0.9	5.20	5.37	5.41	5.41	4.3	4.5	4.6	4.6
India	5.9	6.0	6.0	1.40	1.33	1.33	1.33	8.3	8.0	8.0	8.0
Indonesia	2.9	2.6	2.8	1.82	1.85	1.79	1.79	5.2	4.8	5.0	5.0
Philippines	3.8	3.6	3.7	1.21	1.21	1.18	1.18	4.5	4.4	4.3	4.3
Zimbabwe	1.2	1.2	1.2	1.56	1.63	1.70	1.70	1.9	2.0	2.1	2.1
Others	23.8	23.7	24.0	1.53	1.52	1.51	1.51	36.5	36.1	36.3	36.1
SORGHUM											
World	42.6	43.0		1.30	1.30			55.4	55.8	58.0	58.0
United States	3.7	4.5		4.00	3.48			14.6	15.7	17.4	17.4
Total Foreign	39.0	38.5	38.5	1.05	1.04	1.05	1.05	40.8	40.1	40.6	40.6
Argentina	0.6	0.7	0.7	2.33	2.86	3.00	3.00	1.4	2.0	2.1	2.1
Australia	0.7	0.4	0.6	1.65	2.04	1.80	1.80	1.2	0.8	1.1	1.1
China	1.8	1.8	1.8	3.14	2.94	3.02	3.02	5.6	5.4	5.5	5.5
India	14.8	15.5	15.3	0.71	0.74	0.75	0.75	10.5	11.5	11.5	11.5
Mexico	1.1	1.3	1.3	2.83	2.92	2.88	2.88	3.1	3.8	3.8	3.8
Nigeria	4.4	4.4	4.4	0.80	0.80	0.80	0.80	3.5	3.5	3.5	3.5
South Africa	0.3	0.3	0.3	1.58	1.65	1.65	1.65	0.4	0.5	0.5	0.5
Sudan	5.3	4.1	4.4	0.83	0.61	0.64	0.64	4.4	2.5	2.8	2.8
Thailand	0.2	0.2	0.1	1.35	1.33	1.43	1.43	0.2	0.2	0.2	0.2
Others	9.8	9.8	9.6	1.07	1.01	1.01	1.01	10.4	9.9	9.7	9.7

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 4 (Continued)

Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/89	Prel. 1989/90	1990/91 Proj. May	1990/91 Proj. June	1988/89	Prel. 1989/90	1990/91 Proj. May	1990/91 Proj. June
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.1	22.6		1.70	1.84			37.6	41.6	39.4	39.4
United States	2.2	2.8		1.41	1.95			3.2	5.4	5.1	5.1
Total Foreign	19.9	19.8	18.8	1.73	1.83	1.81	1.82	34.4	36.2	34.3	34.3
USSR	10.9	10.6	10.0	1.40	1.56	1.50	1.50	15.3	16.5	15.0	15.0
Maj. Foreign Exporters	3.5	3.7	3.5	1.94	1.97	2.00	2.00	6.8	7.4	7.1	7.1
Argentina	0.4	0.4	0.5	1.27	1.44	1.33	1.33	0.5	0.6	0.6	0.6
Australia	1.3	1.2	1.1	1.49	1.51	1.36	1.36	2.0	1.7	1.5	1.5
Canada	1.4	1.8	1.6	2.18	2.03	2.19	2.19	3.0	3.5	3.5	3.5
Sweden	0.4	0.4	0.4	3.14	3.56	3.86	3.86	1.3	1.5	1.5	1.5
Other Foreign	5.4	5.5	5.3	2.28	2.26	2.27	2.31	12.4	12.3	12.2	12.2
China	0.6	0.6	0.6	1.19	1.15	1.21	1.21	0.7	0.6	0.7	0.7
Eastern Europe	1.4	1.4	1.4	2.62	2.70	2.68	2.68	3.7	3.7	3.7	3.7
East Germany	0.1	0.1	0.2	3.43	3.33	3.87	3.87	0.5	0.5	0.6	0.6
Poland	0.9	0.8	0.8	2.61	2.74	2.60	2.60	2.2	2.2	2.1	2.1
EC-12	1.8	1.7	1.6	3.10	2.77	2.93	3.09	5.5	4.7	5.0	5.0
France	0.3	0.3	0.2	3.77	3.78	3.80	3.80	1.0	1.0	0.9	0.9
West Germany	0.6	0.5	0.5	4.23	3.78	4.38	4.38	2.4	1.9	2.1	2.1
Finland	0.4	0.4	0.4	2.21	3.24	2.90	2.90	0.9	1.4	1.2	1.2
Norway	0.1	0.1	0.1	3.09	3.53	3.32	3.32	0.4	0.4	0.4	0.4
Others	1.2	1.3	1.2	1.09	1.09	1.09	1.09	1.3	1.4	1.4	1.4
RYE											
World	15.9	16.7		2.08	2.32			33.0	38.8	38.0	38.0
United States	0.2	0.2		1.55	1.76			0.4	0.3	0.4	0.4
Total Foreign	15.6	16.6	15.9	2.09	2.32	2.37	2.37	32.6	38.5	37.6	37.6
USSR	10.1	10.6	10.0	1.83	2.03	2.10	2.10	18.5	21.5	21.0	21.0
Maj. Foreign Exporter											
Canada	0.3	0.5	0.5	1.04	1.72	1.74	1.74	0.3	0.8	0.8	0.8
Other Foreign											
Eastern Europe	3.9	3.9	3.9	2.59	2.96	2.92	2.92	10.0	11.6	11.4	11.4
East Germany	0.6	0.6	0.6	2.94	3.34	3.77	3.77	1.8	2.1	2.3	2.3
Poland	2.9	2.9	2.9	2.52	2.94	2.80	2.80	7.2	8.6	8.2	8.2
Czechoslovakia	0.2	0.2	0.2	3.42	3.42	3.42	3.42	0.5	0.5	0.5	0.5
EC-12	0.9	1.0	1.0	3.05	3.31	3.22	3.20	2.9	3.2	3.2	3.2
Denmark	0.1	0.1	0.1	4.52	4.80	4.35	4.35	0.4	0.5	0.5	0.5
West Germany	0.4	0.4	0.4	4.19	4.69	4.47	4.47	1.6	1.8	1.9	1.9
Others	0.5	0.6	0.5	2.06	2.28	2.26	2.26	1.0	1.3	1.2	1.2

1/ Total of barley, corn, sorghum, oats, and rye shown below plus millet and mixed grain.
2/ Japan, Republic of Korea, and Taiwan.

TABLE 5

Rice Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	1988/89	Prel. 1989/90	Proj. 1990/91	1988/8	Prel. 1989/9	1990/91 Proj. May	1990/91 Proj. June	1988/89	Prel. 1989/90	1990/91 Proj. May	1990/91 Proj. June	1988/89	Prel. 1989/90	1990/91 Proj. May	1990/91 Proj. June	1988/89	Prel. 1989/90	1990/91 Proj. May	1990/91 Proj. June
	——Million Hectares——			—Metric Tons Per Hectare—				——Million Metric Tons——				——In Percent——				——Million Metric Tons——			
World	145.3	146.3		3.4	3.5			487.6	505.0	503.6	503.6	67.7	67.5	67.5	67.5	330.2	341.0	340.1	340.1
United States	1.2	1.1		6.2	6.4			7.3	7.0	7.3	7.3	72.1	70.0	70.0	70.0	5.2	4.9	5.1	5.1
Total Foreign	144.1	145.2	143.4	3.3	3.4	3.5	3.5	480.4	498.0	496.3	496.3	67.6	67.5	67.5	67.5	325.0	336.0	335.0	335.0
Maj. Foreign Exporters	16.5	17.0		2.3	2.3			38.4	39.3			64.1	64.0			24.6	25.2		
Burma	4.5	4.7		2.8	2.9			12.5	13.5			60.0	60.0			7.5	8.1		
Pakistan	2.0	2.1		2.4	2.3			4.8	4.8			66.7	66.7			3.2	3.2		
Thailand	9.9	10.2		2.1	2.1			21.1	21.0			66.0	66.0			13.9	13.9		
Major Importers	13.0	13.7		4.3	4.3			55.8	58.2			66.2	66.1			37.0	38.5		
EC–12	0.3	0.3		5.6	5.9			2.0	2.0			67.3	67.0			1.3	1.3		
Indonesia	9.8	10.4		4.3	4.3			42.3	44.8			65.0	65.0			27.5	29.1		
Nigeria	0.6	0.6		1.3	1.4			0.8	0.9			66.5	66.5			0.6	0.6		
Republic of Korea	1.3	1.3		6.6	6.5			8.4	8.2			72.3	72.0			6.1	5.9		
Other Maj. Import. 1/	1.0	1.0		2.3	2.3			2.3	2.4			65.4	65.4			1.5	1.6		
Other Foreign	114.6	114.5		3.4	3.5			386.1	400.5			68.2	68.0			263.4	272.4		
Australia	0.1	0.1		7.8	8.1			0.8	0.9			71.5	71.5			0.6	0.6		
Bangladesh	10.2	10.7		2.3	2.5			23.3	26.6			66.7	66.7			15.6	17.7		
Brazil	5.3	4.4		2.1	1.9			11.0	8.4			68.0	68.0			7.5	5.7		
China	31.9	32.7		5.3	5.5			169.1	180.1			70.0	70.0			118.4	126.1		
India	41.9	41.5		2.5	2.5			106.0	105.0			66.7	66.7			70.7	70.0		
Japan	2.1	2.1		5.8	6.2			12.4	12.9			72.8	72.8			9.0	9.4		
Philippines	3.5	3.4		2.6	2.6			9.2	9.0			65.0	65.0			6.0	5.9		
USSR	0.7	0.7		4.3	4.2			2.9	2.7			65.0	65.0			1.9	1.8		
Vietnam	5.8	5.9		2.9	3.1			16.8	18.0			65.0	65.0			10.9	11.7		
Others	13.1	13.0		2.6	2.8			34.6	36.9			66.2	63.8			22.9	23.5		

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

JUNE 1990 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 6

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1989/90 Proj.			Prel.	1989/90 Proj.	
	1987/88	1988/89	1989/90	1987/88	1988/89	May	June	1987/88	1988/89	May	June
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
World	54.02	55.70	57.54	1.92	1.71	1.86	1.84	103.67	95.35	106.73	106.00
United States	23.14	23.22	24.03	2.28	1.82	2.18	2.18	52.75	42.15	52.44	52.44
Total Foreign	30.88	32.49	33.51	1.65	1.64	1.63	1.60	50.93	53.20	54.29	53.56
Maj. Foreign Exporters	14.78	16.17	16.38	1.88	1.83	1.84	1.84	27.72	29.60	30.00	30.10
Argentina	4.26	4.00	5.00	2.28	1.60	2.10	2.16	9.70	6.40	10.50	10.80
Brazil	10.52	12.17	11.38	1.71	1.91	1.73	1.70	18.02	23.20	19.50	19.30
Other Foreign	16.10	16.32	17.12	1.44	1.45	1.42	1.37	23.21	23.60	24.29	23.46
Canada	0.46	0.53	0.54	2.75	2.16	2.26	2.26	1.27	1.15	1.22	1.22
China	8.41	8.12	8.06	1.48	1.43	1.35	1.27	12.47	11.65	10.80	10.23
Eastern Europe	0.53	0.56	0.54	1.31	1.20	1.50	1.50	0.69	0.67	0.82	0.82
EC-12	0.56	0.53	0.61	3.16	3.10	2.91	3.27	1.78	1.66	1.78	1.99
India	1.54	1.66	1.90	0.58	0.91	0.89	0.89	0.90	1.50	1.70	1.70
Indonesia	0.95	1.18	1.00	1.00	1.02	1.05	1.05	0.95	1.20	1.05	1.05
Paraguay	0.62	0.85	0.98	1.79	1.90	1.84	1.38	1.10	1.62	1.80	1.35
USSR	0.78	0.76	0.83	0.91	1.16	1.11	1.11	0.71	0.88	0.92	0.92
Others	2.24	2.13	2.66	1.49	1.54	1.58	1.57	3.34	3.28	4.21	4.19
COTTONSEED											
World	31.53	33.67	32.72	0.99	0.96	0.94	0.93	31.31	32.33	30.93	30.37
United States	4.06	4.84	3.86	1.29	1.14	1.10	1.10	5.23	5.50	4.24	4.24
Total Foreign	27.48	28.84	28.86	0.95	0.93	0.92	0.91	26.08	26.84	26.69	26.13
China	4.84	5.53	5.20	1.49	1.27	1.25	1.24	7.22	7.05	6.70	6.44
India	6.46	7.30	7.40	0.50	0.49	0.58	0.56	3.20	3.56	4.26	4.16
Pakistan	2.57	2.50	2.71	1.14	1.14	1.08	1.08	2.94	2.85	2.92	2.92
USSR	3.53	3.43	3.33	1.27	1.46	1.46	1.41	4.49	5.00	4.85	4.70
Others	10.08	10.08	10.21	0.82	0.83	0.77	0.77	8.24	8.37	7.97	7.91
PEANUTS											
World	18.22	19.79	19.57	1.14	1.18	1.14	1.11	20.86	23.36	22.02	21.75
United States	0.63	0.66	0.67	2.62	2.74	2.72	2.72	1.64	1.81	1.81	1.81
Total Foreign	17.60	19.13	18.90	1.09	1.13	1.09	1.06	19.22	21.55	20.21	19.94
Argentina	0.19	0.15	0.18	2.34	1.62	2.06	2.06	0.45	0.24	0.37	0.37
China	3.02	2.91	2.95	2.04	1.95	1.79	1.82	6.17	5.69	5.30	5.36
India	6.84	8.43	8.40	0.86	1.07	0.99	0.92	5.85	9.00	8.00	7.70
Senegal	0.85	0.90	0.79	1.10	0.76	0.93	0.93	0.93	0.69	0.74	0.74
South Africa	0.15	0.19	0.19	1.33	1.24	1.24	1.24	0.20	0.23	0.23	0.23
Sudan	0.58	0.58	0.55	0.76	0.78	0.73	0.73	0.44	0.45	0.40	0.40
Others	5.97	5.98	5.85	0.87	0.88	0.88	0.88	5.18	5.24	5.17	5.15

CONTINUED

TABLE 6 (Continued)

Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1989/90 Proj.			Prel.	1989/90 Proj.	
	1987/88	1988/89	1989/90	1987/88	1988/89	May	June	1987/88	1988/89	May	June
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	15.52	15.08	15.77	1.35	1.36	1.36	1.36	20.92	20.44	21.55	21.40
United States	0.72	0.78	0.74	1.65	1.05	1.10	1.10	1.18	0.81	0.81	0.81
Total Foreign	14.80	14.30	15.03	1.33	1.37	1.38	1.37	19.74	19.63	20.73	20.59
Argentina	2.06	2.30	2.90	1.36	1.39	1.31	1.31	2.80	3.20	3.80	3.80
China	0.89	0.83	0.73	1.40	1.42	1.34	1.34	1.24	1.18	0.98	0.98
EC-12	2.30	2.13	2.00	1.81	1.87	1.64	1.62	4.16	3.98	3.27	3.24
East Europe	1.38	1.31	1.32	1.74	1.62	1.80	1.80	2.40	2.13	2.37	2.37
USSR	4.16	4.28	4.41	1.46	1.44	1.59	1.59	6.08	6.16	7.00	7.00
Others	4.03	3.45	3.67	0.76	0.86	0.89	0.87	3.06	2.98	3.32	3.20
RAPESEED											
World	16.80	17.89	16.91	1.40	1.26	1.28	1.29	23.44	22.53	21.67	21.74
Total Foreign	16.80	17.89	16.91	1.40	1.26	1.28	1.29	23.44	22.53	21.67	21.74
Canada	2.67	3.67	2.91	1.44	1.17	1.05	1.05	3.85	4.31	3.06	3.06
China	5.27	4.94	4.99	1.25	1.02	1.09	1.09	6.61	5.04	5.44	5.44
EC-12	1.86	1.84	1.64	3.20	2.81	3.07	3.05	5.95	5.17	5.00	5.00
East Europe	0.92	0.88	1.00	2.35	2.51	2.60	2.65	2.17	2.20	2.60	2.65
India	4.62	4.87	4.70	0.75	0.86	0.79	0.81	3.46	4.20	3.80	3.80
Others	1.46	1.70	1.67	0.96	0.94	1.07	1.08	1.40	1.61	1.78	1.80
FLAXSEED											
World	3.99	3.68	3.84	0.57	0.45	0.49	0.50	2.27	1.66	1.95	1.92
United States	0.19	0.09	0.07	1.01	0.45	0.47	0.47	0.19	0.04	0.03	0.03
Total Foreign	3.80	3.59	3.77	0.55	0.45	0.49	0.50	2.08	1.62	1.91	1.89
Argentina	0.66	0.54	0.60	0.82	0.86	0.86	0.86	0.54	0.46	0.52	0.52
Canada	0.59	0.50	0.64	1.23	0.74	0.83	0.83	0.73	0.37	0.53	0.53
India	1.15	1.18	1.20	0.34	0.30	0.33	0.33	0.39	0.35	0.40	0.40
USSR	1.07	1.04	0.97	0.21	0.21	0.20	0.21	0.23	0.22	0.23	0.20
Others	0.33	0.33	0.36	0.59	0.66	0.66	0.66	0.20	0.22	0.24	0.24
MAJOR OILSEEDS	*140.08*	*145.82*	*146.34*	*1.45*	*1.34*	*1.40*	*1.39*	*202.47*	*195.67*	*204.84*	*203.19*
United States	28.73	29.58	29.37	2.12	1.70	2.02	2.02	60.99	50.31	59.34	59.34
Total Foreign	111.35	116.24	116.97	1.27	1.25	1.24	1.23	141.48	145.36	145.50	143.85
COPRA	--	--	--	--	--	--	--	4.35	4.27	4.53	4.55
PALM KERNEL	--	--	--	--	--	--	--	2.69	2.93	3.21	3.21
TOTAL OILSEEDS	--	--	--	--	--	--	--	*209.51*	*202.87*	*212.59*	*210.96*
PALM OIL 1/	--	--	--	--	--	--	--	8.36	9.42	10.37	10.37

1/ Not included in total oilseeds.

TABLE 7

Cotton Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
		Prel.	Proj.		Prel.	1990/91 Proj.			Prel.	1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	May	Jun	1988/89	1989/90	May	Jun
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	34.0	32.6		542	528			84.5	79.0	88.0	88.0
United States	4.8	3.9		694	688			15.4	12.2	16.0	16.0
Total Foreign	29.1	28.8	29.5	517	506	531	531	69.1	66.8	72.0	72.0
Maj. Foreign Exporters	13.5	13.2		750	714			46.4	43.3		
Australia	0.2	0.2		1538	1155			1.3	1.3		
Central America 1/	0.1	0.1		869	832			0.4	0.4		
China	5.5	5.2		751	728			19.1	17.4		
Egypt	0.4	0.4		718	639			1.4	1.3		
Mexico	0.3	0.2		1178	876			1.4	0.8		
Pacistan	2.5	2.7		570	539			6.6	6.7		
Sudan	0.3	0.3		437	473			0.7	0.6		
Turkey	0.7	0.7		919	807			3.0	2.7		
USSR	3.4	3.3		801	797			12.6	12.2		
Major Importers 2/	0.4	0.4		817	830			1.6	1.5		
Other Foreign	15.2	15.1		301	316			21.1	22.0		
Argentina	0.5	0.6		389	475			0.9	1.2		
Brazil	2.4	2.2		311	300			3.4	3.0		
India	7.3	7.4		247	288			8.3	9.8		
Syria	0.2	0.2		672	844			0.5	0.6		
Others	4.9	4.8		357	332			8.0	7.4		

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

June 1990 *Production Estimates and Crop Assessment Division, FAS, USDA*

TABLE 8

The table below presents a 9-year record of the difference between the June projections and the final estimates. Using world wheat production as an example, changes between the June projection and the final estimate have averaged 15.7 million tons (3.2 percent) and ranged from -24.5 to 20.4 million tons. The June projection has been below the final 5 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1989/90 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	3.2	15.7	-24.5	20.4	5	4
U.S.	4.1	2.5	-4.2	8.4	5	4
Foreign	3.4	14.5	-26.2	17.5	5	4
COARSE GRAINS 3/						
World	3.8	28.5	-31.4	76.0	4	5
U.S.	14.1	25.4	-30.2	70.3	4	5
Foreign	1.9	10.6	-14.0	28.6	3	6
RICE (Milled)						
World	3.2	9.8	-21.8	11.4	6	3
U.S.	7.0	0.3	-1.1	0.5	4	5
Foreign	3.2	9.8	-21.9	11.2	6	3
SOYBEANS						
World	N/A	N/A	N/A	N/A	N/A	N/A
U.S.	9.6	4.6	-6.5	12.0	4	5
Foreign	N/A	N/A	N/A	N/A	N/A	N/A
		---Million 480-lb. Bales---				
COTTON						
World	4.5	3.6	-13.9	5.6	6	2
U.S.	10.8	1.4	-2.8	1.3	5	4
Foreign	3.8	2.6	-12.4	4.3	6	3
UNITED STATES		--------Million Bushels--------				
CORN	19.6	1,205	-3,327	2,379	5	4
SORGHUM	16.2	122	-228	171	6	3
BARLEY	14.5	58	-73	206	4	5
OATS	23.3	75	-77	231	2	7

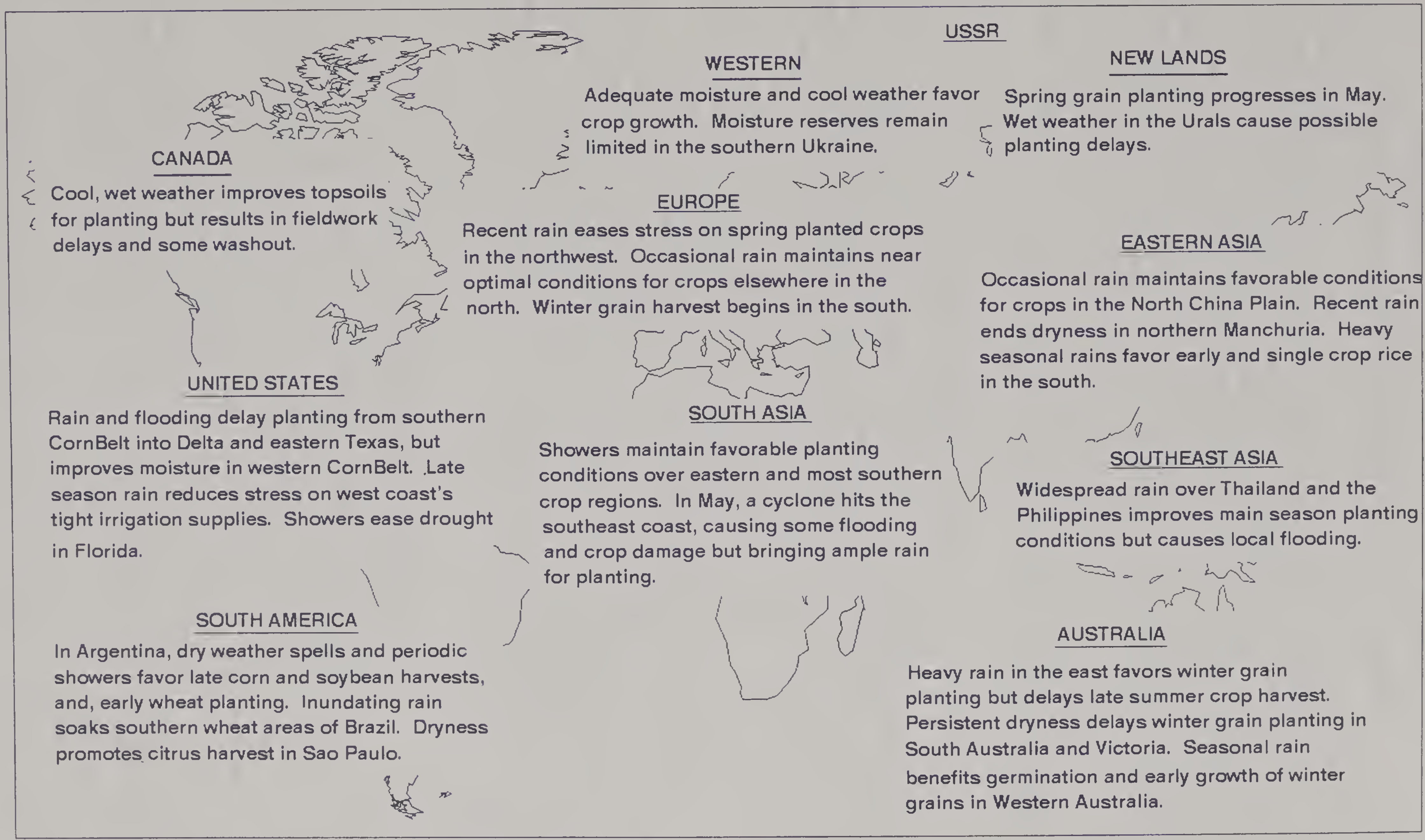
1/ The final estimate for 1981/82-1988/89 is defined as the first November estimate following the marketing year and for 1989/90 last month's estimate.
2/ May not total nine if projection was the same as the final.
3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

June 1990 *Production Estimates and Crop Assessment Division, FAS, USDA*

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

JUNE 12, 1990

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY



(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.

WEATHER BRIEFS

CANADA: TIMELY RAINS BENEFIT PRAIRIE PROVINCES

Unseasonably moderate to heavy precipitation greatly improved spring grain prospects in the southern growing regions of the Prairie Provinces. Precipitation in April was well above normal in the northern spring wheat areas of Alberta and Saskatchewan, but continued well below normal in the south, following months of below normal rainfall. Heavy rains have fallen each week between May 13 and June 12, 1990 in some portion of the southern Prairie Provinces, including southwest Manitoba. This greatly improved soil moisture levels benefiting germination and establishment. As rains continued into June, field work was delayed, and some localized replanting will be required. Most of the spring wheat was planted, but delays in rapeseed planting most likely occurred. Spring wheat planting is usually complete by May 31, rapeseed planting can continue into mid-June.

EUROPE: WEATHER MIXED

Central and southern England and northern France have been persistently drier-than-normal since mid-March. Spring growth of forage, and spring barley crops have been adversely affected in England. This dryness has spread into the Benelux countries, through the Germanies and into Poland. Southern England and northern France received only 25 to 50 percent of normal precipitation for May. The Benelux and Germanies received around 50 percent of normal. However, widespread rain during this period brought temporary relief to many of these areas. Heavy rains (up to 60 mm) from June 3 through 9, 1990, covered an area from central Denmark southward into northern Italy and Yugoslavia. This benefited both winter and summer crops which were becoming too dry. Precipitation continued to be timely and beneficial in southern Europe from Spain into the Balkans. This area, except eastern Romania, received normal to above normal precipitation in April. Precipitation during May was near-normal to below normal, although Romania received widespread beneficial precipitation during the week of May 27 through June 4, 1990.

THE PHILIPPINES: DROUGHT ENDS

Much needed precipitation fell over northern and western Philippines during the period of May 20 through June 8, 1990, the area most adversely affected since last Fall by chronically dry weather. The heaviest rains have been in northern and western Luzon, the area which missed the beneficial April rains, reported in last month's circular. Flooding has likely occurred in Luzon as some areas have received more than 500 millimeters (mm) of precipitation during May 20 through June 3, 1990. In central and eastern Philippines, precipitation levels have decreased and become more variable, but amounts have continued at around the 25 mm level per week, benefiting newly planted grains.

PRODUCTION BRIEFS

ARGENTINA: SUMMER CROP HARVEST PROGRESS

The summer crop harvest in Argentina is on schedule, according to the U.S. agricultural counselor in Buenos Aires. Excellent autumn weather has quickened the pace, although recent light rains have caused minimal delays. The soybean harvest, which runs from April to July, is nearly complete. In the main growing regions of Santa Fe, Cordoba, and Buenos Aires, it is slightly faster than last year. The almost finished corn harvest is a little slower than last year, and will be done by July. Although slower than last year, the sorghum harvest is more than halfway done. The harvest extends from March to July. Cotton harvesting, which lasts from February to July, is on schedule. Sunflowers are in the bin; the harvest spanned from March to May.

CANADA: INITIAL PAYMENTS FOR GRAINS ANNOUNCED

The Canadian Government recently announced the initial payments for wheat and barley by the Canadian Wheat Board (CWB) for marketing year 1990/91. Payments for base grades of wheat and barley and designated malting barley all declined substantially. Initial payments for barley fell 10 percent to Can$90, designated malting barley to Can$125, down 26 percent, wheat dropped to Cam$135, down 18 percent and durum to Can$125, down about 17 percent. Grade and quality price differentials will be announced at a later date. The lower levels are expected to provide the CWB with greater opportunity to price aggressively during the year.

CHINA: FAVORABLE PLANTING CONDITIONS IN NORTHEAST

Recent reports from China's three northeastern provinces indicate that spring planting is going well and much better than last year when a drought affected the area. Liaoning Province received three times normal rainfall from mid-February to mid-April, providing good moisture conditions for paddy rice, spring wheat, and other crops. However, persistent cloudiness left some paddy rice seedlings weakly developed. The weather was also wetter than normal in Jilin, one of China's most important corn-producing provinces. Although the wet spring weather caused some planting difficulties, the overall situation is considered to be favorable. Spring planting conditions and the supply of production inputs are better than last year in Heilongjiang, a major producer of spring wheat, soybeans, and sugar beets. Planting is about a week ahead of schedule and seedling stands are excellent because of timely rainfall in April.

EGYPT: RICE PRODUCTION TARGET ANNOUNCED

Egypt's Ministry of Agriculture and Land Reclamation (MALR) recently announced targeted 1990 rice area and production figures, according to the U.S. agricultural counselor in Cairo. The MALR raised the target for rice area to 0.43 million hectares, due to an increased availability of irrigation supplies. A production goal has been established at 1.72 million tons, of which 0.10 million tons is expected to be available for export. The MALR also initiated a campaign to encourage increased use of short season, high-yielding varieties and intends to provide timely supplies of herbicides, fertilizers, and extension services.

FEDERAL REPUBLIC OF GERMANY: FOREST DAMAGE ESTIMATE FINALIZED

In the aftermath of the February storms throughout Europe, the West German timber industry has been continually reassessing its losses. According to the U.S. agricultural counselor in Bonn, the industry's final damage estimate is 64 million cubic meters. This totals more than two of Germany's normal timber harvests and accounts for nearly two-thirds of total European losses, currently estimated at 100 million cubic meters. While Bavaria reportedly lost 20 million cubic meters, Northern Germany fared much better with projected losses of only 6 million cubic meters. Most of the damage occurred in monoculture spruce stands. Hardwood damage was relatively light totaling approximately 6-8 million cubic meters. Current assessments indicate that as much as 40 percent of the damaged wood will remain unused in the forest.

INDIA: CONTINUED RAPID GROWTH IN POULTRY PRODUCTION

India's 1990 output of poultry meat is forecast at 319,000 tons, up 10 percent from 1989. Even faster growth is forecast for 1991. The spread of fast-food restaurants has caused a sharp increase in demand for poultry meat. Producers like the rapid growth and quick turnover associated with broiler production; consequently, broilers now account for two-thirds of total poultry meat output. Production of eggs in 1990 is forecast at 23.3 billion eggs, up nearly 9 percent from 1989 as increased use of hybrid layers has stimulated productivity.

SOUTH KOREA: DAIRY COW SLAUGHTER SUBSIDY INTRODUCED

The South Korean Government recently introduced a subsidy on dairy cow slaughter, to control a small dairy surplus and to encourage more beef production. The subsidy is 150,000 won or about U.S.$200 per head and is aimed at the most productive animals. The initial target is 3,000 head for 1990 slaughter but some analysts say they expect that target to be raised to 16,000 head by the end of the year. Korea's milk cow population was reported to be about 275,000 head in 1989.

SOUTH KOREA: PORK PRICES UP SHARPLY

Pork prices in South Korea have soared after bottoming out at 79,000 won per 90-kilogram carcass in November 1989. Early June producer prices were reported at 180,000 won per carcass, an increase of 128 percent from the low point and nearly double year-earlier prices (U.S.$1=710 won on June 11, 1990). In percentage terms, wholesale prices have risen just as fast as producer prices, but retail prices are up by a smaller percentage. The higher prices are due to strong demand, since hog slaughter during the first 4 months of 1990 is up 7 per cent compared to the same period of 1989. In an attempt maintain product availability for export markets, the Korean Government has said it will allow pork imports but only on a one-for-one basis with exports.

WORLD CITRUS PRODUCTION

World commercial citrus production during the 1989/90 season is forecast at nearly 47.6 million tons, down 4.4 million tons or 8 percent, from the 1988/89 level. This decline reflects an estimated 2.1-million-ton drop in U.S. production and a projected 2-million-ton shortfall for Brazil. While most of the losses in the United States can be attributed to the December 1989 freeze, Brazil merely appears to be reverting to a more normal yield pattern following last year's record production. The significant downturns currently being projected for Italy, Morocco, and Turkey are expected to be partially offset by increases in other producing countries.

World commercial orange production for 1989/90 is projected at nearly 33.1 million tons, down 3.1 million from a year ago, due to smaller harvests in the United States and Brazil. Tangerine output is estimated at 6.1 million tons, 500,000 tons below 1988/89, because of anticipated crop reductions in Spain, Turkey, and Morocco. Grapefruit production is estimated at 3.2 million tons, a decline of 700,000 tons from a year ago. Lemon output is expected to total 3.3 million tons, 100,000 tons smaller than the 1988/89 volume.

Citrus production in the United States for 1989/90 is estimated at 9.8 million tons, 1.0 million below the December 1989 estimate and 2.1 million or 18 percent smaller than in 1988/89. The U.S. orange crop is forecast at 7.1 million tons, down 14 percent from a year ago. Grapefruit production is expected to decline by 32 percent to 1.8 million tons. Tangerine production is projected to plummet 26 percent to 275,000 tons. Only lemon output is anticipated to remain relatively stable at 669,000 tons, only 3 percent below the 1988/89 volume.

The decline in U.S. production primarily was due to frost damage throughout Florida and Texas during December 1989. The December freeze in Florida, intensified the damage resulting from the February 1989 frosts that killed vegetative growth and prematurely opened blooms. Florida's total citrus production for 1989/90 is forecast at only 6.0 million tons, down 30 percent from last year. Because of the December frost, production in the smaller Texas citrus industry is currently forecast at only one-half the 1988/89 level.

Citrus production in Mexico is forecast at 3.2 million tons, essentially unchanged from last year, but 461,000 tons less than the December estimate, because of frost damage to oranges. Orange production is now estimated at 2.2 million tons, down 19 percent from the 2.7 million tons forecast in December 1989. The tangerine crop is expected to be 6 percent below the December forecast.

Spanish citrus production for 1989/90 is forecast at 4.2 million tons, down 13 percent from the December estimate, and 2 percent below last year. The drop is attributed to heavy rains during the fall and early winter months that damaged fruits in Valencia Province. Orange production is expected to be down 215,000 tons from the December estimate to 2.4 million. Tangerines are projected down 405,000 from December to 1.0 million tons. The lemon crop is forecast at 670,000 tons, down 4 percent from December and 9 percent below 1988/89.

Italy's citrus production for 1989/90 is estimated at 2.7 million tons, down 17 percent from last year, but unchanged from the December estimates. However, 1988/89 production has been increased 8 percent to 3.3 million tons largely because of a 10-percent upward revision for oranges and a 4-percent increase in the lemon estimate.

In Greece, citrus production is projected to increase 17 percent from a year ago to 1.2 million tons, 108,000 above the December estimate for 1989/90.

Japanese citrus production is projected to be slightly below last year at 2.6 million tons, despite the fact that this is an "on-year" in the bearing cycle for tangerines. In December, the 1989/90 crop was forecast up 4 percent, but tangerine output is now estimated at 2.4 million tons, down 4 percent from the December forecast, due to a reduction in the number of trees harvested and a slight drop in yields. Natsu-mikan, the other major citrus fruit in Japan, is expected to decline by 21 percent, since December, to slightly less than 200,000 tons. This reflects reduced harvesting compared to what was forecast last December. Overall, Japanese production is falling because of Government subsidy payments that encourage producers to abandon groves, and increased competition from imported citrus.

In Israel, citrus production for 1989/90 is projected up 25 percent to 1.3 million tons, 100,000 greater than the December estimate, due to improved growing conditions. Favorable weather is also expected to increase the citrus crop in the Gaza Strip to a record 194,000 tons, up 45 percent from the December estimate and 55 percent above last year.

Morocco's 1989/90 citrus production is forecast to fall 25 percent to 1.1 million tons, because of heavy pruning and harvesting delays. This forecast is approximately 50,000 tons below the December estimate.

Algeria's citrus production for 1989/90 is estimated at 348,000 tons, up 12 percent from last year. Production had been gradually declining since 1974 as the Government withdrew support from citrus producers with the rise of the petroleum and manufacturing industries. With the decline of petroleum prices since 1986, the citrus industry has been receiving more support.

December estimates for Cuba's grapefruit production have been revised upward 23 percent to 400,000 tons. Orange production is now projected down 12 percent from the December forecast. Total 1989/90 citrus production is estimated up 3 percent to approximately 1 million tons.

Brazil's citrus crop for 1989/90 is estimated at 13.3 million tons, down 2 million from the record harvest in 1988/89. The drop is due, in part, to stress from last year's large output when a record orange crop of 14.2 million tons was harvested under exceptionally good weather conditions and an unusually large second bloom. This year, orange production is expected to be 12.2 million tons, the second best on record.

Argentine citrus production for 1989/90 is estimated at 1.7 million tons, up 21 percent from last year's drought reduced crop of 1.4 million tons. Higher production is expected because of improved weather conditions during the spring and summer. Orange production is projected up 29 percent, lemon output is expected to rise by over 43 percent, and the grapefruit crop is projected up 13 percent. Tangerine production is down sharply, reportedly due to a fungal disease. Orange and lemon prices, in U.S. dollar terms, are double last year's levels, which may be a factor in the sharp rise in projected production.

In Chile, total citrus production is down slightly because inclement weather sharply reduced lemon production. Orange production is forecast at 115,000 tons, equal to the revised estimate for 1988/89.

Citrus production in Uruguay is projected up 15 percent after 2 years of weather reduced crops.

Australia's citrus crop is estimated at 593,000 tons, down 7 percent from last year. The decline reflects stress from last year's bumper crop. Orange production, which accounts for 80 percent of all citrus production, is down because growers allowed the Valencia crop to remain on the trees too long in an attempt to secure higher prices.

South African citrus production for 1989/90 is estimated at 831,000 tons, up 3 percent from last year. Production was down last year because of stress from the record 1987/88 crop of 883,000 tons.

Arthur Hausamann (202) 382-8883

TABLE 9

WORLD COMMERCIAL CITRUS PRODUCTION
(1,000 metric tons)

	1985/86	1986/87	1987/88	1988/89	1989/90 1/
NORTHERN HEMISPHERE					
ALGERIA					
Oranges	197	167	183	208	230
Tangerines	90	78	84	93	105
Grapefruit	5	2	2	3	4
Lemons	5	6	8	8	9
Total	297	253	277	312	348
CUBA					
Oranges	441	496	508	520	520
Tangerines	32	25	25	26	30
Grapefruit	237	250	285	385	400
Citrus, other	70	64	80	62	70
Total	780	835	898	993	1,020
CYPRUS 2/					
Oranges	157	204	138	153	165
Tangerines	5	5	6	6	6
Grapefruit	93	111	96	97	105
Lemons	54	54	46	49	49
Total	309	374	286	305	325
EGYPT 2/					
Oranges	1,168	1,235	1,387	1,199	1,390
Tangerines	106	117	134	151	155
Grapefruit	2	2	2	2	2
Lemons	1	1	2	2	2
Citrus, other	120	150	138	190	210
Total	1,397	1,505	1,663	1,544	1,759
GAZA STRIP					
Oranges	142	151	83	98	168
Grapefruit	13	14	10	14	14
Lemons	15	15	12	13	12
Total	170	180	105	125	194
GREECE					
Oranges	554	881	462	770	933
Tangerines	54	68	49	69	73
Grapefruit	5	6	5	6	6
Lemons	186	168	89	170	179
Citrus, other	4	4	3	4	4
Total	803	1,127	608	1,019	1,195

TABLE 9

WORLD COMMERCIAL CITRUS PRODUCTION
(1,000 metric tons)

	1985/86	1986/87	1987/88	1988/89	1989/90 1/
ISRAEL					
Oranges	685	815	627	546	700
Tangerines	123	158	122	90	150
Grapefruit	371	392	317	353	400
Lemons	50	69	47	37	30
Citrus, other	6	13	14	16	20
Total	1,235	1,447	1,127	1,042	1,300
ITALY					
Oranges	2,257	2,424	1,343	2,170	1,655
Tangerines	500	531	333	411	400
Grapefruit	8	8	3	7	6
Lemons	800	813	592	708	650
Citrus, other	38	41	42	18	26
Total	3,603	3,817	2,313	3,314	2,737
JAPAN					
Oranges	63	62	67	58	54
Tangerines	2,870	2,542	2,941	2,387	2,379
Lemons	1	1	2	2	2
Citrus, other	288	279	288	227	185
Total	3,222	2,884	3,298	2,674	2,620
MEXICO					
Oranges	1,410	1,683	1,942	2,268	2,200
Tangerines	123	131	151	157	169
Grapefruit	82	91	105	75	100
Lemons	9	9	9	9	9
Citrus, other	500	600	672	680	700
Total	2,124	2,514	2,879	3,189	3,178
MOROCCO					
Oranges	841	650	891	994	810
Tangerines	347	290	303	420	250
Grapefruit	6	4	4	4	4
Lemons	17	20	20	21	20
Citrus, other	7	7	16	12	11
Total	1,218	971	1,234	1,451	1,095
SPAIN					
Oranges	1,942	2,059	2,442	2,216	2,419
Tangerines	1,050	1,164	1,307	1,260	1,047
Grapefruit	13	18	18	22	23
Lemons	482	613	760	733	670
Citrus, other	23	16	16	15	13
Total	3,510	3,870	4,543	4,246	4,172

TABLE 9

WORLD COMMERCIAL CITRUS PRODUCTION
(1,000 metric tons)

	1985/86	1986/87	1987/88	1988/89	1989/90 1/
TURKEY 2/					
Oranges	505	750	700	700	600
Tangerines	257	300	280	320	250
Grapefruit	24	30	27	30	27
Lemons	180	250	220	280	170
Citrus, other	9	6	5	5	4
Total	975	1,336	1,232	1,335	1,051
UNITED STATES					
Oranges	6,903	7,122	7,903	8,269	7,080
Tangerines	298	370	369	372	275
Grapefruit	2,134	2,346	2,541	2,580	1,766
Lemons	628	986	712	689	669
Citrus, other	69	57	52	50	50
Total	10,032	10,881	11,577	11,960	9,840
TOTAL NORTHERN HEMISPHERE					
Oranges	17,265	18,699	18,676	20,169	18,924
Tangerines	5,855	5,779	6,104	5,762	5,289
Grapefruit	2,993	3,274	3,415	3,578	2,857
Lemons	2,428	3,005	2,519	2,721	2,471
Citrus, other	1,134	1,237	1,326	1,279	1,293
Total	29,675	31,994	32,040	33,509	30,834
SOUTHERN HEMISPHERE					
ARGENTINA					
Oranges	623	621	650	580	750
Tangerines	243	252	286	290	240
Grapefruit	178	190	176	150	170
Lemons	450	460	517	350	500
Total	1,494	1,523	1,629	1,370	1,660
AUSTRALIA					
Oranges	523	475	394	524	486
Tangerines	34	33	39	44	42
Grapefruit	33	32	30	31	30
Lemons	45	36	35	36	35
Total	635	576	498	635	593

TABLE 9

WORLD COMMERCIAL CITRUS PRODUCTION
(1,000 metric tons)

	1985/86	1986/87	1987/88	1988/89	1989/90 1/
BRAZIL					
Oranges	11,015	10,650	10,400	14,150	12,150
Tangerines	486	479	453	467	482
Grapefruit	21	29	24	25	25
Lemons	16	35	50	50	50
Citrus, other	347	396	512	544	564
Total	11,885	11,589	11,439	15,236	13,271
CHILE					
Oranges	73	95	120	115	115
Lemons	70	64	80	85	75
Total	143	159	200	200	190
SOUTH AFRICA, REPUBLIC OF					
Oranges	497	577	682	604	640
Grapefruit	99	115	135	135	130
Lemons	57	63	66	66	61
Total	653	755	883	805	831
URUGUAY					
Oranges	90	79	68	70	81
Tangerines	48	45	35	37	43
Grapefruit	6	8	8	8	9
Lemons	46	52	54	54	62
Total	190	184	165	169	195
TOTAL SOUTHERN HEMISPHERE					
Oranges	12,821	12,497	12,314	16,043	14,222
Tangerines	811	809	813	838	807
Grapefruit	337	374	373	349	364
Lemons	684	710	802	641	783
Citrus, other	347	396	512	544	564
Total	15,000	14,786	14,814	18,415	16,740
WORLD CITRUS					
Oranges	30,086	31,196	30,990	36,212	33,146
Tangerines	6,666	6,588	6,917	6,600	6,096
Grapefruit	3,330	3,648	3,788	3,927	3,221
Lemons	3,112	3,715	3,321	3,362	3,254
Citrus, other	1,481	1,633	1,838	1,823	1,857
TOTAL	44,675	46,780	46,854	51,924	47,574

1/ June 1990 Estimate unless otherwise noted. 2/ Estimate previously reported.

WORLD COFFEE PRODUCTION

The initial forecast of 1990/91 world green coffee production is 101.7 million 60-kilogram bags, up 10 percent from the 92.6 million-bag harvest last year but down 1 percent from the 1987/88 record level of 102.8 million bags. North and South America and Asia showed increases over last year but Africa's harvest is projected down 2 percent or 302,000 bags. South American production is forecast up 16 percent to 51.5 million bags, third highest on record. This region accounts for 51 percent of the 1990/91 world forecast.

Brazil, the world's largest coffee producer, is forecast to harvest a crop of 33.0 million bags in 1990/91, 27 percent (7 million bags) above last season, but 6.6 million below the 1961/62 record. Brazil has a potential for a crop of about 43 million bags from a coffee bush population estimated at more than 4 billion trees. However, 1990/91 is the off-year in the biennial coffee cycle, and weather conditions have not been favorable for optimal development of the crop. A drought in the states of Sao Paulo, Minas Gerais, and Espirito Santo in January and February of this year resulted in a downward revision of 4 million bags from the earlier provisional forecast (see Circular Series WAP 3-90).

In Colombia, the world's second largest coffee producer, coffee production in 1990/91 is forecast at 13.6 million bags, 5 percent above last year's crop, but 5 percent below the previous record set in 1981/82. The expected increase is due to expanded coffee area and progress in an ongoing program to replace older trees with high-yielding, disease-resistant types. The modern varieties need to be replanted every 20 years compared to 30-40 years for traditional varieties. The new varieties also lengthen the harvest period. Coffee production in Colombia is labor intensive largely due to the type of terrain on which the crop is grown. It is generally produced on the hillsides, making mechanization difficult. The coffee tree population is estimated at 2.9 billion. Despite the demise of the International Coffee Organization's (ICO) quota system and subsequent lower world coffee prices, production remains relatively high. The Colombian Government continues to pay growers at the same level, adjusted for inflation, as when the quotas were in place. Funds accumulated by the National Coffee Fund, during profitable years, are currently being used to subsidize production.

In Indonesia, the third largest coffee producer in the world, 1990/91 production is forecast at 6.5 million bags, down 150,000 from the last year and 250,000 bags less than the record set in 1988/89. Indonesia's coffee industry is characterized by smallholder production of relatively low quality, robusta coffee. The bulk of production has come from traditional varieties, and producers used few inputs. This situation is changing. The Indonesian Coffee Exporters' Association (AEKI) is spearheading a program to increase plantings of high-yielding coffee varieties, by assisting producers in obtaining credit to upgrade production practices. Recently developed robusta varieties are being distributed to smallholders, particularly in the Lampung area of Southern Sumatra. During the past year, the Department of Trade has distributed Arabica seedlings to growers in highland areas of North Sumatra in an attempt to increase production. However, total coffee planted area is not expected to change significantly from the current level. Over the past several years, the AEKI has spent considerable resources to improve coffee quality. It continues to provide technical assistance on harvesting and drying, and utilizes portable drying, testing, and grading equipment to demonstrate quality differences to producers. Many processors have invested in new drying and sorting equipment which has produced higher grades of green beans for export.

Mexico's coffee production in 1990/91 is forecast at 4.75 million bags, 6 percent more than last year's harvest but 547,000 bags down from the record 1986/87 crop. The 1990/91 increase over the previous year is mainly due to the "on-year" cyclical nature of production. In addition, large private coffee growers increased investments, at the farm level, thereby improving cultural practices and expanding area in high-yielding coffee varieties. However, output will not be as high as in recent years because many trees were killed by the December 1989 freeze. Input prices increased well above the 20 percent domestic inflation rate in calendar year 1989. Only 10 percent of the growers, representing 40 percent of total production, continue to improve cultural practices in order to protect coffee tress from pests and diseases. Many small growers depend heavily on technical assistance and government supplied inputs to implement disease and pest control measures. Low domestic and international coffee prices resulted in high small-grower debt in almost all coffee producing states. Many small growers who are inefficient and working on marginal land are expected to be forced out of business. The area planted to coffee in 1990/91 is expected to decline as many small growers with low yields leave the industry. The total coffee tree population is about 760 million trees.

In the Cote d'Ivoire, 1990/91 coffee production is forecast at 3.67 million bags, up 7 percent (253,000 bags) from the revised 1989/90 estimate but 40 percent less than the record crop of 6.09 harvested in 1980/81. The projected rise for the upcoming season is due to improved rainfall during the final flowering period, the return to production of a large number of recently pruned trees, and an on-year in the biennial yield cycle. Low producer prices are having a negative effect on potential production. The Government cut the producer price of coffee in half in October 1989, thus reducing potential crop size and quality. With reduced crop returns, farmers will find it difficult to pay for the necessary labor, weeding, harvesting, and other input activities needed to insure a high quality product. The total coffee tree population in Cote d'Ivoire is about 1.8 billion trees, second only to Brazil, but an aging tree population limits production potential. About 60 percent of existing plantations are over 15 years old and 25 percent are over 25 years of age and have become marginally productive.

Guatemala's 1990/91 coffee production forecast is a record 3.35 million bags, up 2 percent from last year and continuing a trend begun in 1986/87. The increase primarily reflects expansion in the number of bearing trees. Yields, which are low by Central American standards, are expected to improve as more productive, smaller trees and more densely planted areas begin to produce. Yields for the 1990/91 crop are expected to be higher because the increase in world coffee prices from October 1989 lows have encouraged growers to fertilize trees. Furthermore, producers have been replacing aging trees with improved varieties (Catuai, Caturra, and Catimor) for the past several years. The Asociacion Nacional del Cafe (ANACAFE) continues to help producers improve soil and shade tree management. However, the two problems which continue to concern medium and large producers, who account for 60 percent of the area, are the lack of credit and the increasing cost of inputs. In November 1989, the Government liberalized exchange rates. This has made imported inputs more expensive and has contributed to inflation, currently running at an annual rate of 28 percent. Coffee is produced in 20 of Guatemala's 22 departments, where the elevations are roughly 1,000 feet above sea level. About half of the coffee is "strictly high grown" quality, cultivated at or higher than 4,000 feet above sea level. ANACAFE and the U.S. Agency for International Development (USAID) are cooperating on a Small Coffee Development Project that provides credit for inputs necessary to improve small-grower yields.

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TABLE 10

GREEN COFFEE: TOTAL PRODUCTION IN SELECTED COUNTRIES
1987/88-1989/90, ESTIMATES; 1990/91 FORECAST 1/
(IN THOUSANDS OF 60-KG BAGS) 2/

Region and Country	1987/88	1988/89	1989/90	1990/91
NORTH AMERICA				
Costa Rica	2,375	2,758	2,453	2,600
Cuba	425	450	400	400
Dominican Republic	837	726	756	760
El Salvador	2,538	1,492	2,377	2,400
Guatemala	3,020	3,022	3,295	3,350
Haiti	540	550	550	550
Honduras	1,553	1,635	1,965	2,050
Jamaica & Dep	41	15	25	25
Mexico	4,717	5,200	4,500	4,750
Nicaragua	650	625	600	600
Panama	220	200	220	220
Trinidad and Tobago	15	15	15	15
United States 3/	229	254	270	275
TOTAL	17,160	16,942	17,426	17,995
SOUTH AMERICA				
Bolivia	155	165	180	170
Brazil	38,000	25,000	26,000	33,000
Colombia	13,000	10,700	13,000	13,600
Ecuador	1,663	2,150	2,050	2,090
Guyana	4	5	5	5
Paraguay	300	410	430	400
Peru	1,020	1,400	1,400	1,150
Venezuela	1,331	1,127	1,112	1,050
TOTAL	55,473	40,957	44,177	51,465
ASIA				
India	2,050	3,590	2,000	3,500
Indonesia	5,965	6,750	6,650	6,500
Malaysia	78	75	75	75
Philippines	1,045	1,350	1,050	1,150
Sri Lanka	70	75	70	75
Thailand	592	1,025	800	900
Vietnam	130	150	175	175
Yemen	60	65	65	65
TOTAL	9,990	13,080	10,885	12,440

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TABLE 10

GREEN COFFEE: TOTAL PRODUCTION IN SELECTED COUNTRIES
1987/88-1989/90, ESTIMATES; 1990/91 FORECAST 1/
(IN THOUSANDS OF 60-KG BAGS) 2/

Region and Country	1987/88	1988/89	1989/90	1990/91
AFRICA				
Angola	250	200	200	200
Benin	30	40	35	35
Burundi	625	600	515	550
Cameroon	1,251	1,760	1,500	1,200
Central African Rep.	235	250	250	250
Congo	15	25	25	25
Cote d'Ivoire	3,103	3,783	3,417	3,670
Equatorial Guinea	18	15	15	15
Ethiopia	3,100	2,900	3,000	3,000
Gabon	30	35	30	30
Ghana	14	15	15	15
Guinea	95	100	125	125
Kenya	2,127	1,735	1,600	1,600
Liberia	60	82	50	50
Madagascar	1,125	1,000	1,150	1,000
Malawi	83	72	95	90
Nigeria	95	90	95	90
Rwanda	717	583	600	600
Sierra Leone	110	92	100	100
Tanzania	801	868	830	870
Togo	290	300	300	300
Uganda	2,600	3,000	3,100	3,000
Zaire	2,000	1,750	1,710	1,640
Zambia	11	10	15	15
Zimbabwe	250	175	225	225
TOTAL	19,035	19,480	18,997	18,695
OCEANIA				
New Caledonia	6	6	5	5
Papua New Guinea	1,100	1,175	1,118	1,090
TOTAL	1,106	1,181	1,123	1,095
WORLD TOTAL	102,764	91,640	92,608	101,690

1/ Coffee marketing year begins about October in some countries and April or July in others.
2/ One bag = 132.276 pounds.
3/ Includes Puerto Rico and Hawaii.

NOTE: Production estimates for some countries include cross-border movements.

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WORLD UNMANUFACTURED TOBACCO PRODUCTION

World 1990 unmanufactured tobacco production is forecast at 6.9 million metric tons, 2 percent below last year's harvest. The decline primarily reflects projected reductions in Chinese, Indian, Turkish, and Brazilian production, resulting from cutbacks in planted area. The United States and Bulgaria are forecast to show sizable production increases due to area expansion and improved yields.

Tobacco production in North America is forecast up 7 percent in 1990 to 0.81 million tons. U.S. production is projected up 13 percent as higher production quotas for burley and flue-cured led to 5 percent higher plantings. Mexican production is forecast down 26 percent due to continued tight planting credits and adverse weather in Nayarit, the main production area. Heavy rains last fall throughout Nayarit damaged seedlings, and unusual rainy, cloudy weather from December through March led to further damage. Both the quality and quantity of the light air-cured and burley crops are expected to be adversely affected. Canada is forecast to produce a 16-percent smaller crop because poor export prospects caused a reduction in the flue-cured production quota.

The Caribbean tobacco crop is expected to be down sharply in 1990. Surplus stocks and weak export demand in the Dominican Republic precipitated a reduction in plantings of dark air-cured tobacco.

Tobacco production in South America is forecast at 0.58 million tons, down 5 percent from 1989. Brazil's 1990 crop is down 6 percent because farmers reduced plantings about 4 percent in response to what they considered to be unacceptably low prices for last year's record crop. Similarly, low prices prompted Argentine growers to cut plantings by 10 percent which is expected to reduce the 1990 tobacco crop by 13 percent.

The European Community's (EC) 1990 tobacco crop is projected at 0.41 million tons, down slightly from last year. Although increased plantings and higher yields are expected to significantly boost production in Greece, it will not be sufficient to offset reduced plantings in Italy and Spain, the two other major EC producers. In Italy, 1990 production is forecast down 5 percent because of an expected reduction in EC price guarantees. Spain's 1990 crop is projected down 13 percent due to a 15-percent drop in area.

Production in Eastern Europe is projected up 11 percent to 0.32 million tons. Bulgaria's crop is expected to increase after a sharp drop in 1989 due to the large number of ethnic Turkish/Bulgarian tobacco farmers who emigrated to Turkey. Production is also projected up in Yugoslavia as plantings increase after two consecutive years of below-normal area. In Poland, a slight production increase is anticipated following last year's sharp downturn due to surplus stocks.

Soviet tobacco production for 1990 is projected at 0.23 million tons, down 5 percent from 1989. It now appears that Soviet production is declining at a much slower rate compared to the sharp reductions recorded during the mid-1980's.

Tobacco production in Sub-Saharan Africa, currently projected at 0.33 million tons, will be slightly below the 1989 volume. Zimbabwe's crop is forecast down slightly due to lower yields. Despite increased plantings, South African production is expected to be down 16 percent. The decline reflects severe hail and wind damage that reportedly cut the flue-cured harvest by 20 percent.

East Asian 1990 tobacco production is projected down 3 percent to 3.8 million tons. China's crop, forecast at 2.7 million tons, is expected to fall 3 percent. Plantings are forecast down about 3 percent because producers expect better earnings from alternative crops. Indian production is projected down 12 percent despite increased plantings. A lack of rain during planting and untimely rains later in the season cut estimated yield prospects about 14 percent. Indonesia's production is projected up 5 percent as plantings have increased to meet growing domestic demand for flue-cured and cigar tobacco. Production in South Korea is projected down slightly based on the expectation that yields will be down from last year's unusually high levels. In the Philippines, the 1990 crop is estimated down 3 percent largely based on reduced plantings of burley because of unfavorable producer prices. Japanese production is projected up slightly after a sharp drop in 1989 due to a 25 percent cut in area. A 17-percent increase in the average tobacco price during 1989 has temporarily stopped the downtrend in Japanese plantings. Pakistan's 1990 production is projected down because of reduced plantings and reduced yield expectations. Thailand's crop is estimated up 14 percent due to increased plantings and higher projected yields. Production is growing in response to expanding demand for cigarettes.

The 1990 tobacco crop in the Middle East is projected at 0.28 million tons, down 10 percent from 1989. Most of the region's decline is explained by a 16 percent drop in Turkey. Turkey's plantings are projected down 19 percent in reaction to unfavorable support prices that were artificially held down in order to clear surplus stocks.

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TABLE 11
TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
NORTH AMERICA						
Canada	29,136	31,530	28,230	69,787	74,125	62,145
Mexico	44,895	33,029	22,860	75,120	59,890	44,445
United States	256,692	275,034	287,777	621,202	621,360	700,037
REGION TOTAL	330,723	339,593	338,867	766,109	755,375	806,627
SOUTH AMERICA						
Argentina	55,233	56,348	50,591	72,235	80,544	70,401
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	267,000	294,000	282,000	419,000	462,000	435,000
Chile	3,024	3,423	3,901	9,969	11,105	13,050
Colombia	20,771	19,900	20,274	31,839	30,236	31,369
Ecuador	1,940	1,800	1,800	4,160	3,850	3,850
Guyana	100	100	100	100	100	100
Paraguay	5,225	2,740	3,040	7,070	3,545	4,045
Peru	2,500	2,500	2,500	3,100	3,100	3,100
Uruguay	800	800	800	1,400	1,400	1,400
Venezuela	8,799	7,917	8,556	14,528	13,490	14,547
REGION TOTAL	366,642	390,778	374,812	564,651	610,620	578,112
CENTRAL AMERICA						
Costa Rica	800	851	878	1,643	1,567	1,733
El Salvador	620	624	617	1,409	1,532	1,565
Guatemala	5,184	6,440	6,687	8,951	11,866	11,654
Honduras	2,340	2,531	2,753	3,775	4,246	5,154
Nicaragua	2,240	2,240	2,240	4,550	4,550	4,550
Panama	720	720	720	1,302	1,302	1,302
REGION TOTAL	11,904	13,406	13,895	21,630	25,063	25,958
CARIBBEAN						
Cuba	50,000	50,000	50,000	44,000	44,000	44,000
Dominican Rep.	22,828	27,011	13,649	22,757	28,053	18,703
Haiti	565	565	565	730	730	730
Jamaica & Dep	1,175	1,175	1,175	2,339	2,339	2,339
St. Vincent	70	70	70	88	85	85
Trin. and Tobag	100	100	100	170	170	170
REGION TOTAL	74,738	78,921	65,559	70,084	75,377	66,027
NORTH AFRICA						
Algeria	2,580	2,600	2,700	4,200	4,800	5,000
Libya	900	900	900	1,450	1,450	1,450
Morocco	4,767	5,800	6,450	6,437	7,685	8,530
Tunisia	5,400	5,410	5,410	5,500	5,600	5,600
REGION TOTAL	13,647	14,710	15,460	17,587	19,535	20,580

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TABLE 11
TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA--- 1988	1989	1990 (FORECAST)	---PRODUCTION--- 1988	1989	1990 (FORECAST)
	----HECTARES----			----METRIC TONS----		
OTHER AFRICA						
Angola	3,950	3,950	3,950	3,900	3,900	3,900
Benin	200	200	200	400	400	400
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Cameroon	3,400	3,400	3,400	5,100	5,500	5,500
Cent. Afr. Rep.	750	750	750	625	650	650
Chad	200	200	200	200	200	200
Congo	4,000	4,000	4,000	1,800	1,800	1,800
Cote D' Ivoire	10,000	10,000	10,000	2,467	2,490	2,490
Ethiopia	3,000	3,000	3,000	3,400	3,450	3,500
Ghana	3,950	3,950	3,950	1,825	1,850	1,850
Kenya	5,100	5,100	5,100	8,262	8,850	8,850
Liberia	10	10	10	10	10	10
Madagascar	5,900	5,900	5,900	5,500	5,500	5,500
Malawi	89,750	89,640	95,200	75,053	86,615	88,750
Mali	1,000	1,000	1,000	550	550	550
Mauritius	1,633	1,650	1,650	912	936	936
Mozambique	2,700	2,700	2,700	2,900	2,900	2,900
Niger	1,000	1,000	1,000	930	930	930
Nigeria	8,198	8,198	8,198	8,075	8,075	8,075
Reunion	200	200	200	210	200	200
Sierra Leone	540	540	540	600	600	600
South Africa	24,936	25,699	24,902	30,705	37,305	31,310
Swaziland	200	200	200	200	200	200
Tanzania	21,250	21,250	21,250	17,055	15,000	14,000
Togo	4,000	4,000	4,000	2,000	2,000	2,000
Uganda	3,300	3,500	4,300	3,000	3,200	4,000
Zaire	3,700	3,700	3,700	4,110	4,110	4,110
Zambia	3,500	3,500	3,500	4,300	4,300	4,300
Zimbabwe	61,563	60,544	64,060	123,671	135,205	134,270
REGION TOTAL	269,930	269,781	278,860	309,360	338,326	333,381
OTHER ASIA						
Bangladesh	54,000	54,000	54,000	51,545	51,545	51,545
Burma	55,000	55,000	55,000	45,000	45,000	45,000
Cambodia	9,000	9,000	9,000	5,000	5,000	5,000
China	1,554,850	1,726,500	1,617,250	2,729,500	2,777,150	2,692,300
India	318,000	375,300	384,245	367,400	491,400	434,530
Indonesia	241,377	233,529	244,540	137,775	150,114	158,050
Japan	40,557	30,661	30,661	85,790	74,397	74,410
Korea, North	37,000	37,000	37,000	46,000	46,000	46,000
Korea, South	31,821	30,985	31,329	72,998	78,422	73,227
Laos	4,000	4,000	4,000	3,000	3,000	3,000
Malaysia	9,632	12,481	10,300	7,480	13,877	10,950
Pakistan	41,599	43,216	42,124	69,530	73,950	70,420
Philippines	49,457	46,850	46,150	68,802	73,396	71,150
Sri Lanka	12,165	12,165	12,165	9,000	9,000	9,000
Taiwan	8,654	8,019	7,940	20,712	18,986	19,183
Thailand	55,502	56,716	61,700	58,561	64,780	73,560
Vietnam	32,000	32,000	32,000	28,000	28,000	28,000
REGION TOTAL	2,554,614	2,767,422	2,679,404	3,806,093	4,004,017	3,865,325

June 1990 Production Estimates and Crop Assessment Division, FAS, USDA

*U.S.GOVERNMENT PRINTING OFFICE:1990-262-853:20517/FAS

UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C. 20250

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TABLE 11
TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	AREA 1988	AREA 1989	AREA 1990 (FORECAST)	PRODUCTION 1988	PRODUCTION 1989	PRODUCTION 1990 (FORECAST)
	HECTARES			METRIC TONS		
MIDDLE EAST						
Cyprus	161	161	161	241	241	241
Iran	18,000	18,000	18,000	24,500	25,000	25,000
Iraq	2,000	2,000	4,000	2,180	2,180	4,360
Israel	800	400	200	295	280	150
Jordan	6,000	6,000	6,000	4,000	4,150	4,150
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Oman	1,800	1,800	1,800	2,100	2,000	2,000
Syria	14,355	10,145	15,500	16,054	10,859	17,010
Turkey	236,860	273,837	220,850	218,774	252,657	212,144
United Arab Em.	350	350	350	2,000	2,000	2,000
Yemen (Sanaa)	3,322	3,300	3,300	5,600	5,720	5,720
REGION TOTAL	287,398	319,743	273,911	280,744	310,087	277,775
EUROPEAN COMMUNITY						
Belgium-Lux.	426	438	435	1,647	1,805	1,800
France	12,670	11,413	10,930	29,357	29,216	26,230
Germany, West	3,084	3,299	3,260	7,090	7,049	7,350
Greece	87,006	81,421	84,000	134,795	125,651	136,500
Italy	93,810	98,200	91,000	184,355	197,000	188,000
Portugal	2,123	2,076	2,353	4,151	5,472	5,890
Spain	24,400	27,330	23,187	34,325	45,415	39,475
REGION TOTAL	223,519	224,177	215,165	395,720	411,608	405,245
OTHER WEST EUROPE						
Austria	259	256	236	457	404	377
Switzerland	685	675	670	1,750	1,620	1,500
REGION TOTAL	944	931	906	2,207	2,024	1,877
EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Bulgaria	87,609	79,000	83,500	115,734	83,200	106,000
Czechoslovakia	3,750	3,750	3,750	5,500	5,500	5,500
Germany, East	3,648	3,656	2,620	5,382	5,415	3,797
Hungary	10,900	10,200	8,490	22,800	19,305	19,885
Poland	41,772	29,429	30,150	92,870	60,000	62,050
Romania	39,500	39,000	40,000	38,650	37,425	38,800
Yugoslavia	52,000	50,000	53,000	51,000	57,500	64,660
REGION TOTAL	263,179	239,035	245,510	346,936	283,345	315,692
USSR	131,500	127,500	120,000	242,000	236,235	225,000
OCEANIA						
Australia	5,015	4,771	4,800	13,335	13,296	13,500
New Zealand	700	600	600	1,800	1,550	1,550
Solomon Islands	100	100	100	96	95	95
REGION TOTAL	5,815	5,471	5,500	15,231	14,941	15,145
WORLD	4,534,553	4,791,468	4,627,849	6,838,352	7,086,553	6,936,744

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